View in browser

FinancialPlanning

Wealthtech Weekly

February 20, 2025

By Rob Burgess
Reporter

I've been covering wealthtech for years, and an issue I've heard consistently from advisors is both how potentially powerful and unwieldy Salesforce can be as a CRM solution.

For the latest edition of "Show Me Your Stack," I spoke with Nepsis CTO Amanda Butler. She helped optimize Salesforce to work with the firm's tech stack. I'm sure others in a similar situation could learn from her experiences.

I hope you'll check out the article, along with the rest of this week's stories.

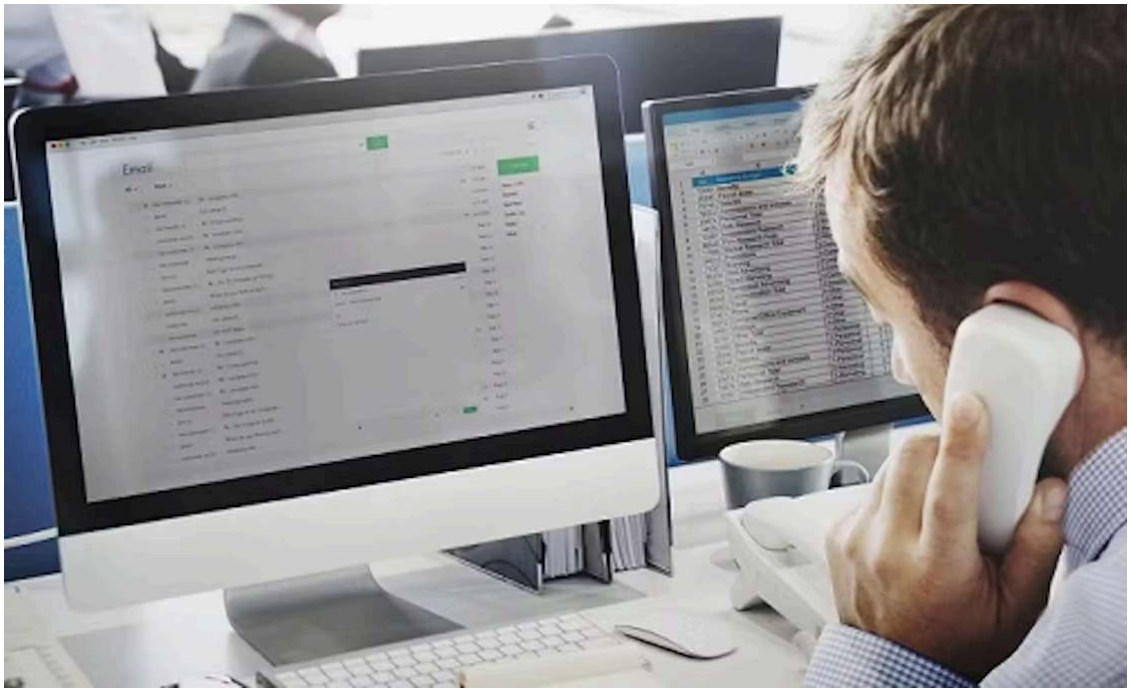
As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

SHOW ME YOUR STACK

Taming the Salesforce beast: Show Me Your Stack



Amanda Butler, chief technology officer of Nepsis, said she has been working for over a decade to help the firm integrate its tech stack with Salesforce.

- **Policy, economic concerns sinking advisor confidence**
  Advisors reported that the speed with which President Trump seeks to remake Washington in the first few weeks of his second term also had clients on edge.
- **Financial advisors could get CE credit for giving back under CFP proposal**
  A series of proposals by the Competency Standards Commission could allow up to 10 continuing education (CE) hours to be earned through pro bono service at a ratio of three hours of pro bono service per one hour of CE.
- **Financial advisors tap AI for growth but face ethical hurdles**
  The ever-changing landscape of artificial intelligence promises new innovations for financial advisors, but it also brings fresh ethical concerns.
- **Top brokers, RIAs and other rankings from FP in 2024**
  We named the largest firms and honored those making an impact in wealth management and technology, among other recognitions in the last year.

Read the latest in Wealthtech

FINANCIAL PLANNING

You're receiving this email because you signed up for Editorial emails from Financial Planning.

To update the emails you want to receive, or to unsubscribe from our mailing list, please visit our Email Preference Center.

arizent

Arizent
360 Madison Avenue, 8th Floor
New York, NY 10017

About | Subscriptions | Contact | Privacy Policy

Have questions or concerns? Contact Support

Follow us in real time: